DOCUPHASE

ScanDox
Troubleshooting Guide
DocuPhase Versions: 5.1 (and later)
Last Revised: September 20, 2019

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Revision History

Item #	Release #	Revision Date	Description	Tracking Notes
002	5.1 and later	09/20/19	Disclaimer added to the cover.	kbennett
001		09/17/19	Original	EAllen/ TW 31/US29396

Introduction

While ScanDox is a simple, efficient tool for capturing documentation, there are times when something may appear to have gone awry. Most of the time, such issues are easily resolved. The following procedures will provide you with the basic and most likely solutions to any challenges you may run into when using ScanDox.

> ⓘ **IMPORTANT!**
>
> *As of version 6.1, the name of the iSynergy platform was changed to DocuPhase. You may notice some updates and revised files paths have been updated to reflect this change.*
>
> *Please review the 6.1 Release Notes (in online help or via the DocuPhase Learning Library: https://training.docuphase.com/lesson/docuphase-platform-6-1-release-notes) for more information about the name change.*

I Can't See/Find Something I Think I Should?

Remember, what you see in the ScanDox system is based on your security access/login credentials. If you think you should have access to something you don't, please contact your DocuPhase Technical Point of Contact (TPOC) for assistance.

Should I Use this Document or Just Contact the DocuPhase Help Desk?

In most cases, it's beneficial to any user to know how to solve their own issues with the system. This means not having to rely on or wait for assistance when you can quickly find an answer and resolve the issue on the fly. Therefore, we recommend that you at least review this guide to learn about how you might troubleshoot issues, and actually attempt some of the solutions provided here before you contact Technical Support.

However, should you have questions or don't feel familiar enough with the system to try the recommended procedures, feel free to contact the DocuPhase Help Desk. Please see *What If I Still Can't Figure It Out?* on page 13 of this guide for details about how and what to submit when requesting assistance from the Support Team.

> 🗋 **NOTE**
>
> *The first part of this guide is meant to be used by any end user. However, if you cannot resolve the issue using the information provided there, contact your TPOC for assistance (see page 10 of this guide).*

Document Processing through ScanDox

Any document or group of Documents are entered, processed in, and sent out of as follows:

A) A document(s) is entered into in any of several ways:
- ✓ Scanned from the main scanning device
- ✓ Dragged and dropped from a local/cloud network or local device
- ✓ Downloaded from an Email attachment
- ✓ Uploaded from a multi-functional scanning device

Once the document(s) appears in the Tray:

B) The User selects a Profile to assign the document to an Application, then enters the appropriate Index values.

C) The User submits the file to the Uploads folder where the Batch Number and related XML are assigned for processing into the DocuPhase system.
The XML component contains the Application and Index information entered by the User in step B.

Once in the Uploads folder:

D) The Upload Service detects the file and its xml, and moves them into the SQL Batches Table in DocuPhase Repository.

Once the Document passes into the DocuPhase system:

E) An Object ID is assigned to the Document, that is then "filed" into the DocuPhase repository.
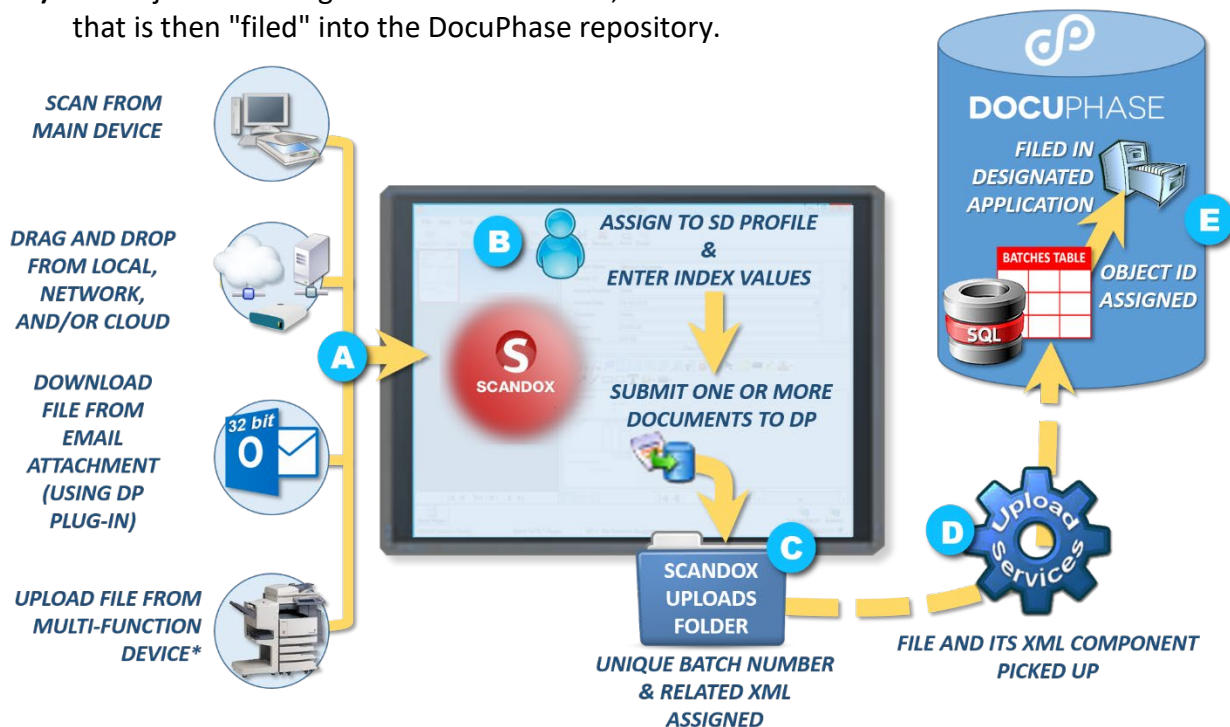
*Documents can be uploaded to a HotFolder.

> ☼ **TIPS**
>
> *Depending upon the way the Submit (🗗) action is configured for your organization, files could go a number of places. However, the above shows a typical configuration so that a submitted Document goes straight to the Uploads folder. You can use the Help⬚More Info button to view folders used in ScanDox (see Appendix B on page 15).*

Issue 1- Unable to Find Submitted Documents in the Repository

Any document uploaded to ScanDox appears in the "Tray" until it is submitted to the DocuPhase Repository. If you don't see the document in the Repository after submission, use the following recommended solutions to find it.

Recommended Solutions – For Most End Users*

Solution 1A: Check the Repository

The two most common reasons a Document may not appear in the Repository as expected: You'll need to search for the document as It may have been submitted incorrectly with regard to one or both of the following

✓ **Application**

The ScanDox Profile used to submit a Document determines the Application within the DocuPhase Repository into which it's filed. If you use the wrong Profile for the Document, it will be submitted to the wrong Application - see the Search suggestion shown below.

✓ **Status**

Because DocuPhase is status driven, the System Status of a Document determines where it goes and/or to whom it is available within the system. This means that you may be unable to find a document because it's in a System Status that you didn't expect. In addition, in regular circumstances when you search for a document, results only show those items with a System Status of "E" (Entered) - see the Search suggestion shown on the next page).

☞ *EXAMPLES*

The following are examples of why a document may be in a status you didn't anticipate:

- *Documents routing through Data Exchange do so while under a Sys-Status of "R" (although "R" is not the only status that may be seen in Data Exchange).*

- *Documents with Auto-indexing errors are automatically given a Sys-Status of "P" (Pending) until the indexing has been verified by a user.*

WAS THE DOCUMENT SUBMITTED TO THE WRONG APPLICATION?

In DocuPhase:

1) Perform a Global Search u... value that you know is contained within or related to the document in question.

    Search results should show the document in the Application in which it resides.

If the Document was submitted to the wrong Application:

2) Right-click on the file icon to display a list of options, then select Edit Indexes.

3) Route the document from the current Application to the correct Application.

    OR

In this example, the Invoice was inadvertently submitted to the ***Payroll*** *Application instead of the* ***Purchasing*** *Application.*

So it is now being ***Routed to*** *reside in the* ***Purchasing*** *Application.*

Search for the Document (continued on next page)

Search for the Document (continued)

If you still don't see the Document in question, check the status via an Application Search following the procedure shown below:

WAS THE DOCUMENT SUBMITTED WITH AN UNEXPECTED STATUS?

In DocuPhase:

1) Perform an Application Search, and select the Application containing the document for which you are looking.

In the Object Status field:

2) Select "All".

3) Click [Search] to search for all documents in stored in the selected Application within the repository.

4) Look through the list to find the document in question.

5) Change the status (via *Edit Indexes*), as appropriate.
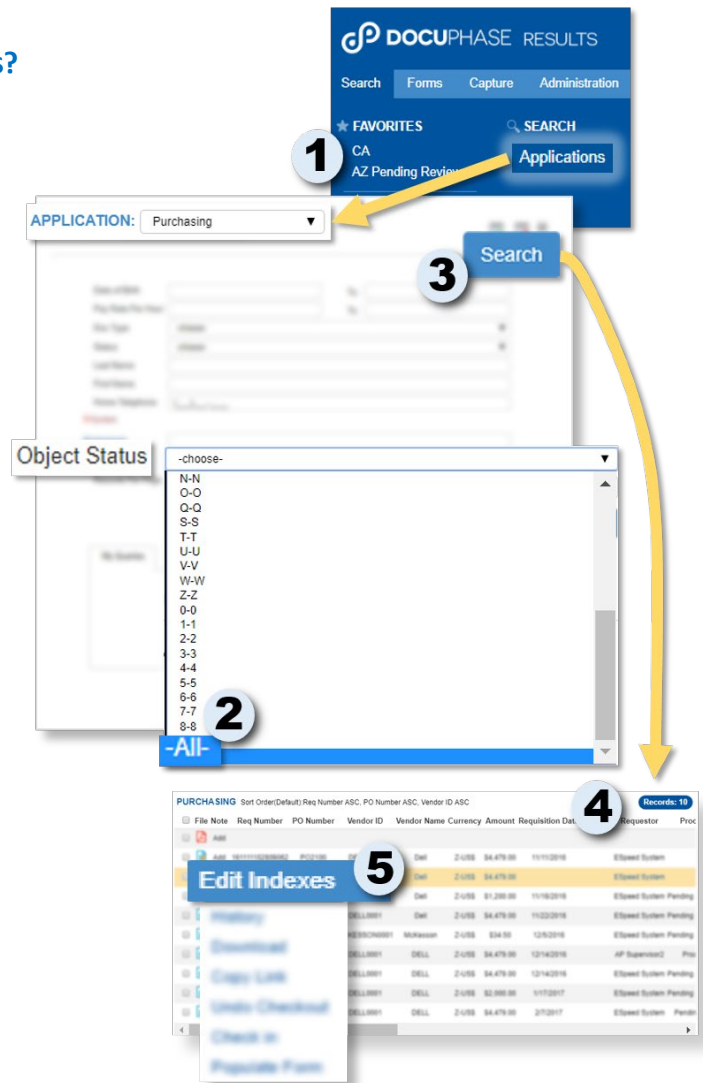
If you still don't see the document in question, then it likely has not been successfully submitted by ScanDox. Try resubmitting the Document and/or contact your System Administrator for assistance.

*The ability to perform Solutions 1A and 1B is based on permissions. If you are unable to complete these checks, contact your System Administrator.
**On the Application search screen only, System Status is represented as "Object Status", but they are actually the same thing.

Recommended Solutions – For Most End Users (continued on next page)

Recommended Solutions – For Most End Users (continued)

Solution 1B: Make Sure Upload Service Is Running

Since **Upload Service** is the part of Windows Services that actually uploads and moves captured documents through the Repository (see previous page); therefore, if it's not running, documents cannot be saved to the DocuPhase Repository.

THERE ARE THREE WAYS TO CHECK THE STATUS OF THE UPLOAD SERVICE:

- ✓ **ScanDox Desktop Window** (Lower left Corner) – see below
- ✓ **Windows Services Interface** – see page 6
- ✓ **Upload Manager** – – see page 7

> ⓘ **IMPORTANT!**
>
> *The information below includes information regarding two different ways of starting and restarting the Upload Service. Please be aware that as an End User, you may not have the necessary system authorization to perform this procedure. It is recommended that you contact your TPOC before attempting to correct issues using these techniques (see page 13 of this guide).*

> 👍 **BEST PRACTICE**
>
> *Text DocuPhase recommends restarting the Upload Service through the Windows Services window (as described on page 6 of this guide), as that interface better "understands" the user profile permissions.*

Checking the Status of Upload Service on the ScanDox Desktop Window

Look for the status in the lower left corner; if you don't see "Ready" as the status, please follow instructions for restarting the Upload Services as described on the next page.
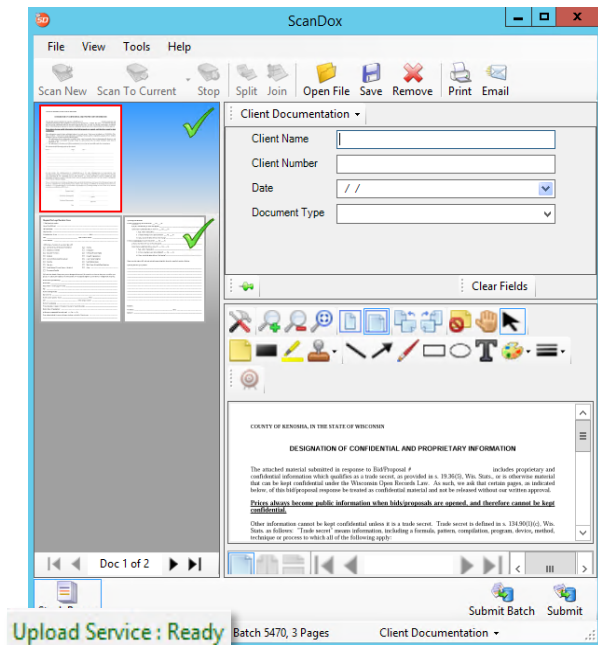
Solution 1B: Make Sure Upload Service Is Running (continued)

Using Windows Services Interface to Make Sure Upload Services Are Running*

DocuPhase has its own set of services that can be found in the Windows Services Interface. When you open the interface, you should see all of those services prefixed with **DocuPhase** **. This is where you can restart/relaunch the **Windows Upload Services**.

Find and click (Services icon) from your Windows desktop or taskbar to display the list of Windows Services.

1) Find **DocuPhase – ScanDox Upload Service** in the list and check the status.

If the Status shows as "Running", you may need to restart it:

2) Right-click the line on which **DocuPhase – ScanDox Upload Service** appears to display a list of options, then

OR

If there is NO status showing , or shows as "Stopped" you need to restart/relaunch the service:

Right-click the line on which **DocuPhase – ScanDox Upload Service** appears to display a list of options, then click **Start**.
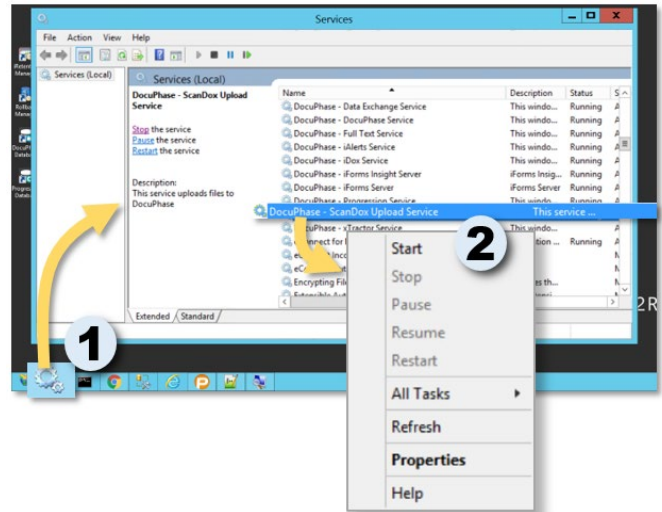
Please see IMPORTANT note on previous page, as well as **Contact Your Technical Point of Contact (TPOC) on page 13 of this guide*
**If using DocuPhase platform version prior to 6.1 use the "iDatix…" naming convention rather than "DocuPhase" as shown above.

Solution 1B: Make Sure Upload Service Is Running (continued)

Using Upload Manager ( ) to Make Sure Upload Service Is Running

While **Upload Service** controls the movement of documents from **ScanDox** into the repository, **Upload Manager** is the interface that allows you to stop and start Upload Service, as well as check the status of items in the queue for the **Upload Service**. Ensure **Upload Service** is running by following the steps below.

In the lower, right corner of your workstation desktop:

1) Click to show the hidden icons.

2) Click to open the **Upload Manager** console.

> *You can also mouse-over to display the current status (i.e., online or offline).*

If Upload Service is already running, you may need to restart it:

3) Click to restart it.

OR

If Upload Service is stopped, you need to start the service.

Click to start it.
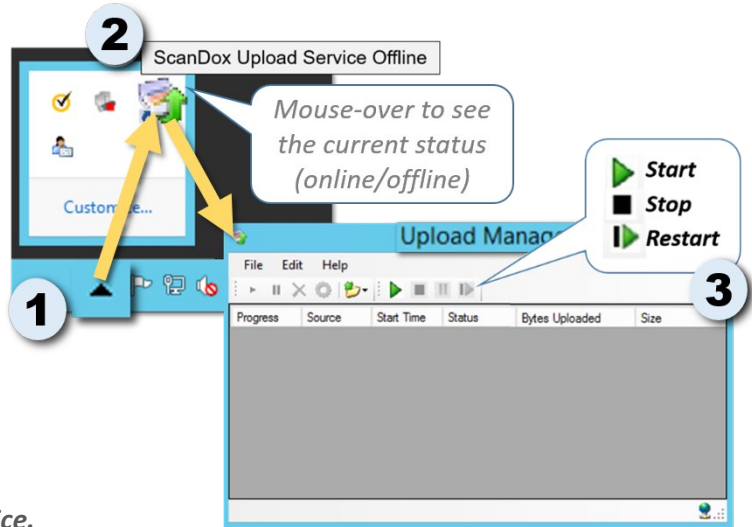
Recommended Solution – for Workstation Admins ONLY

Solution 1C: Make Sure ScanDox Is Connected

If ScanDox isn't connected to your network, it can't move items to the Repository.

1) Log out and back in again to refresh the ScanDox user interface.

On your desktop:

2) Click to display the console window.

In the ScanDox console window:

3) Check the connection status in the lower, right corner of the window.

> confirms that ScanDox is connected to the network, but indicates that it is NOT connected.

If there is no connection:

4) Restart the **Upload Service** from the **Windows Services Interface** (as described on page 6).

OR

Close and re-open ScanDox

> **(!) IMPORTANT!**
>
> *A Workstation Administrator sign-on is generally required to start or restart the ScanDox. If you are not the Administrator of your workstation, please contact your TPOC (see page 13 of this guide) for assistance.*

Recommended Solutions – For DocuPhase TPOCs ONLY

The information provided in this section is meant for Certified DocuPhase Technical Point of Contacts only. End Users generally do not have access to the areas of the system, nor the necessary permissions to perform the procedures described below. Therefore, as your company's TPOC, you may get requests for assistance from End Users. who can't find their documents in the Repository or if/when Upload Service isn't running. End Users are encouraged to try troubleshooting procedures as described on previous pages; however, there may be times when their attempts are unsuccessful. That's where the TPOC comes in.

> ☼ *TIP*
>
> *For general troubleshooting, make sure that the server settings are correct and that the correct server name is used. The server name varies depending upon implementation - use System options in DP to find out what server name should be used.*

Solution 1D: Look for the Missing Documents in Three Places

If documents have not successfully made it out of ScanDox and into the Repository, then you will see the documents listed in any of the following: the ScanDox Tray, ScanDox Upload Service Directory, and/or SQL Batches Table. Check each of these locations to make sure each of them is empty.

✓ **Tray Documents**

Documents in the Tray are meant to be going through the Indexing process. They are stored in a temporary folder located at <C:\Users\training\AppData\Local\DocuPhase\ScanDox\Files>. * Any documents that remain in the Tray have not been submitted to ScanDox, which is why they won't appear in the Repository. **Make sure the documents are submitted appropriately.**

> ① **IMPORTANT!**
>
> **The ScanDox temporary Tray folder is unique to the Windows user profile, not the DocuPhase User.**

✓ **Upload Directory**

Once a document has been "submitted" from ScanDox, the document is moved to the following location where it is then "picked up" by the DocuPhase Upload Service < C:\ProgramData\ DocuPhase \ScanDox\Uploads>*. If documents appear in this location, it's possible that:

If Upload Service IS NOT running

Go to the Services directory and check the status of Upload Service. **If it is not running, start it. and restart it as necessary**.

If the Start option is available, Upload Services is not running: Click on it to start Upload Services
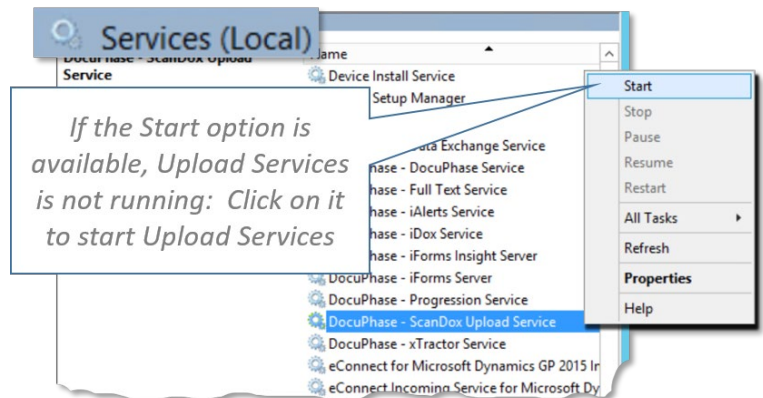
Solution 1D: Look for the Missing Documents in Two Place (continued)

If Upload Service IS running, but files remain in this folder:

Go to the Log file (see Appendix C on page 17)to check for errors that are preventing the files from being pushed up to DocuPhase. **Base the resolution of this issue on the information that is provided in the error.**

> ☼ **TIP**
> *You can also stop and start the Services, or close and re-open ScanDox. If that doesn't work, check the Log File (see Appendix C on page 17).*

Services (Local)

	Name
DocuPhase - ScanDox Upload Service	Device Install Service
	Device Setup Manager

When Uploads Services is running, the Start option is unavailable; so, you need to check the logs.

Start
Stop
Pause
Resume
Restart
All Tasks ▶
Refresh
Properties
Help

...nge Service
...cuPhase Service
se - Full Text Service
se - iAlerts Service
se - iDox Service
se - iForms Insight Server
se - iForms Server
DocuPhase - Progression Service
DocuPhase - ScanDox Upload Service
DocuPhase - xTractor Service
eConnect for Microsoft Dynamics GP 2015 Ir
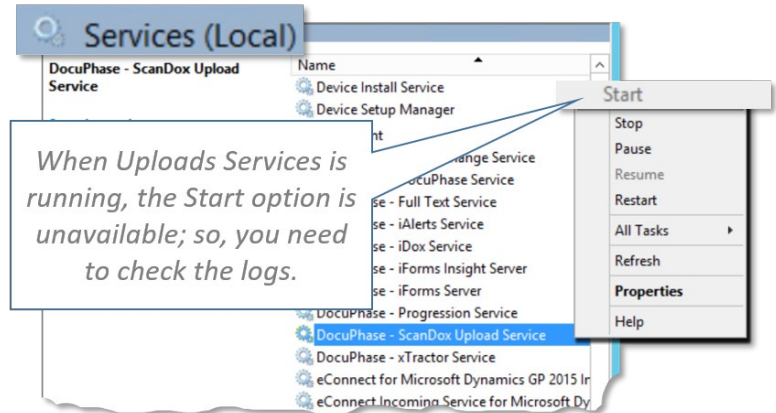eConnect Incoming Service for Microsoft Dy

---

> ⊙ **IMPORTANT!**
>
> *If you determine that files need to be deleted from the Uploads Folder, be sure to stop Upload Service prior to deleting the files. Once the files are deleted, start Upload Service (as shown on the previous page).*

✓ **SQL Server Batches Table**
   Once a document is picked up from the Upload folder/directory by the Upload Service, it is sent to the Batches Table within DocuPhase; this is where the Object ID is assigned. This table allows you to see and verify the Profile used (i.e., to which Application a Document was sent), as well as its status, and other identifying information (see Appendix E on page 19 for more information). If it the user sent it to the wrong Application, be sure that the profile used shows the location as appropriate, and/or that the User submitted Documents with the right Profile for this Application. **Take action as needed depending upon any submission "error" you see here (i.e., submitted to the wrong Application, with the wrong status, etc.).**

IF THE DOCUMENTS AREN'T IN ANY OF THESE THREE LOCATIONS
If you don't see the document in either the ScanDox Tray, Upload Service Directory, or the Batches Table, then it is DEFINITELY in the DocuPhase Repository, but there's a reason it's not showing. Therefore, the next thing to do is to follow the information provided for Solution 1E as described on the next page.

Solution 1E: Make Sure the Authentication URL is Functioning

If a submitted document does not appear in the either the Tray or the Upload Service directory, it likely means that ScanDox and the Repository don't have the correct authentication required for connection. Both the **UploadManager.exe.config** and **UploadService.exe.config** files contain an Authentication URL.   Use the steps below to make sure the URLs are working:

> ⚠️ **WARNING!**
>
> *Always open configuration files with Notepad++ (or any XML editor); opening it with regular Notepad saves configuration file in .txt format (rather than its "config" format): resulting in broken configuration.*

1) Go to **< C:\Program Files (x86)\ DocuPhase \ScanDox\ ***.

2) Use **Notepad ++** open the **UploadManager.exe.config** and **UploadService.exe.config** files.

3) Verify that the authentication for both is correct.
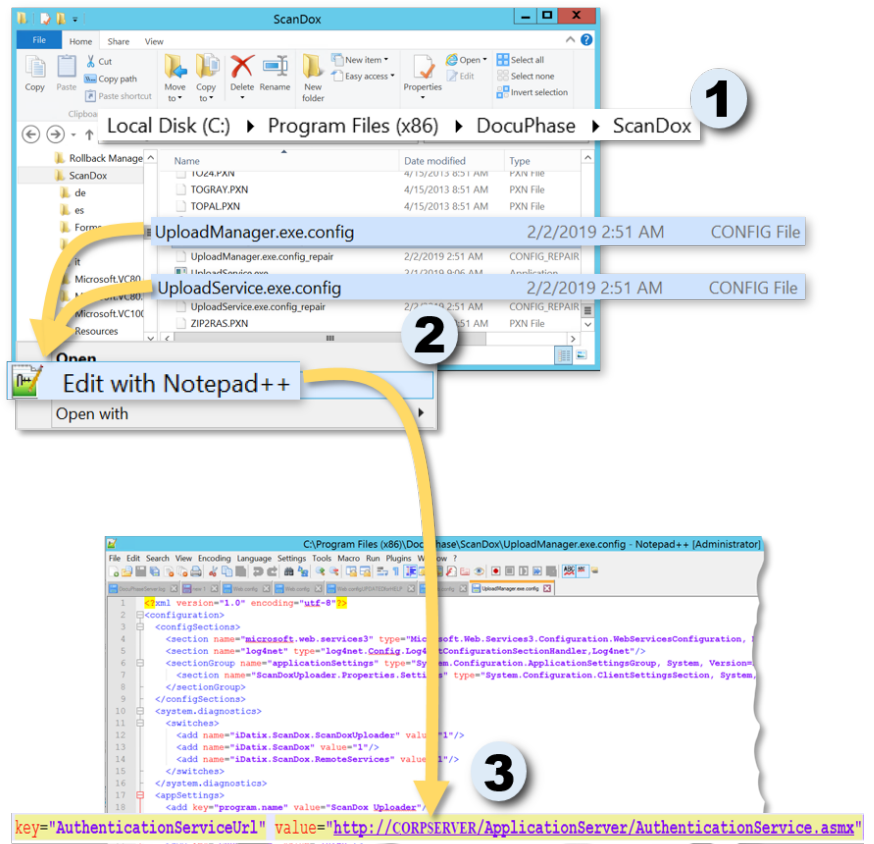
> 🗒 **NOTE**
>
> *The front end of the authentication URL will always be the URL for our platform (minus the /isynergy or /docuphase) and therefore could be http or https. The authentication will always end with "applicationserver/authenticationservice.asmx"*

*Users of DocuPhase platform prior to versions 6.1 see the "iDatix..." naming convention rather than "DocuPhase".

Solution 1E: Make Sure the Correct Authentication URL is Correct (continued on next page)

Solution 1E: Make Sure the Correct Authentication URL is Correct (continued)

4) Copy the URL and paste into a browser to test to display a screen like the one shown here:
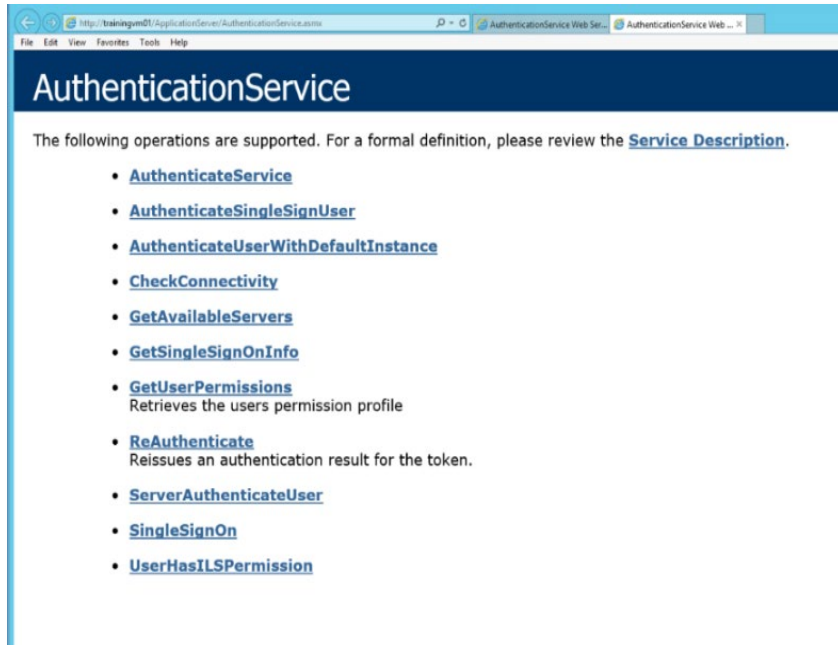
⊙ IMPORTANT!

Anything that appears other than this screen is likely to be a 404 or http error: indicating an issue with connection to the server. Please review steps 1 through 3 as described on the previous page to make sure the correct URL is being used. Otherwise, you may need to contact the DocuPhase Support Team for assistance (see Submit a ticket to DocuPhase Support Team page 13 of this guide).

Solution 3: Check Tracelogs

Errors from various ScanDox activities are recorded in corresponding logs that can be used to find (and sometimes even indicate ways to resolve) issues. Check date and time stamps to make sure the time and date match with the problem.

🗋 NOTE

- *You can access the logs at `<C:/ProgramData/DocuPhase/tracelogs>` or by using the Help menu (as shown in Appendix C, on page 17).*
  - *The level of what is written to the logs can be adjusted in the xml configuration file associated with that the associated component (e.g., applicationdata.xml, userpermissiondata.xml, workspace.xml, etc.). Xml configuration files can be accessed at `<C:/Users/Administrator/AppData/Loca/DocuPhase/scandox>` or by using the Help menu (as shown in Appendix D, on page 18).*
- *If the information here does not help you resolve the issue, copy the corresponding log, and include it in the email to the DocuPhase Support Team for assistance (see Submit a ticket to DocuPhase Support Team page*

👍 BEST PRACTICE

Sort the Tracelogs in the folder by date, so that the most recent logs come to the top of the folder.

Issue 2- Unable to Upload Documents *(for System Admins/TPOCs ONLY)*

Solutions:

If a user is not able to upload a document to ScanDox, check the following possible reasons for resolution:

- ✔ The User does not have Permissions set allowing them to use ScanDox.
- ✔ The Email plug-in is set for 64, rather than 32
- ✔ ScanDox was not properly installed on their workstation.
- ✔ Scanning devices (see item A in the diagram on page 2) are not properly connected.

Issue 3- One or More Profiles Aren't Working Properly
(for System Admins/TPOCs ONLY)

Solutions:

- ✔ Review the Profile used to submit the missing document(s), and make sure it's set to the appropriate Application and Status.

  Also double-check and verify that all settings are made correctly, including Index Controls, AutoComplete, and Lookups.
- ✔ Make sure Connections are set correctly as they are required for indexing within ScanDox.
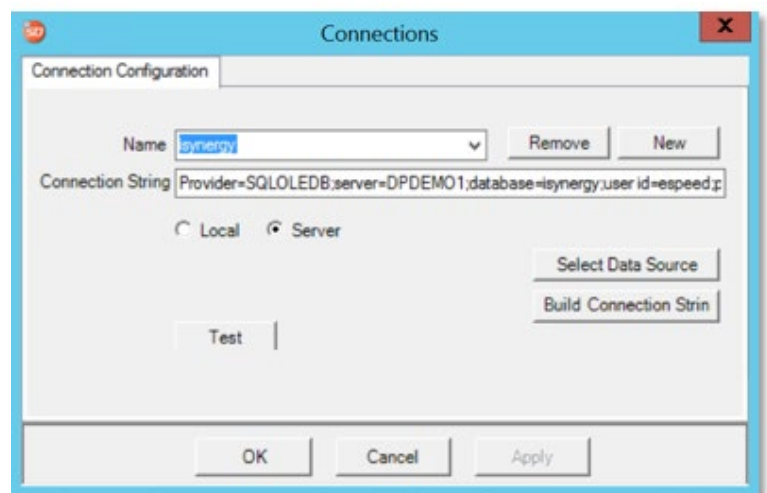
Issue 4- Unable to Add or Edit Profiles *(for System Admins/TPOCs ONLY)*

Solution:

You must be logged in as System Administrator to add and/or make changes to Profiles.

What If I Still Can't Figure It Out?

Once you have reviewed this document and have not resolved issues by using the troubleshooting solutions provided here,

Contact Your Technical Point of Contact (TPOC)

Generally, any end-user can use the troubleshooting recommendations provided on the previous pages of this guide. However, if the information provided does not resolve your issue, please contact your organization's Technical Point of Contact (TPOC) who has been certified on the DocuPhase platform and should be able to resolve most local issues.

> ⊙ *IMPORTANT!*
>
> *If you have not been certified on the DocuPhase platform, you should not move any further through this guide, as you will not have enough information and access to make stable and recommended adjustments to the platform.*

Submit a ticket to DocuPhase Help Desk

If the TPOC is unable to resolve the problem using the information provided in this guide, please submit a ticket (via support@docuphase.com) to the DocuPhase Support Team.

Please make sure to include a detailed description of the issue to support@docuphase.com.

> ⊙ *IMPORTANT!*
>
> *If you work with us through a Partner Vendor, support tickets should be submitted to your vendor first.*

> 🗋 *NOTE*
>
> *You can submit a help ticket at any time. However, the days and times when the Support Team are available are as follows:*
>
> *Monday - Friday*
> *8:00 AM EST to 5:00 PM EST*

> 👍 *BEST PRACTICE*
>
> *To expedite your email request for assistance, please provide ALL of the following information in your email:*
>
> ✓ *Enter a clear, concise description on the Subject line of your email (e.g., Can't see documents submitted through ScanDox).*
>
> *Then, include the following in the body of the email:*
>
> ✓ *A detailed description of the issue, including steps you followed, and any troubleshooting you may have already done.*
>
> ✓ *If you have used the Tracelogs to try to resolve an issue, be sure to copy and paste the corresponding log into your email.*
>
> *Be sure to also include add this information as well:*
>
> ✓ *Can you reproduce the issue?*
>
> ✓ *When did ScanDox work last for you?*
>
> ✓ *What version of ScanDox and DocuPhase are you using? (see Appendix on page 14)*

Appendices

Appendix A - Locating the Product Versions in Use

If you need to contact DocuPhase Technical Support, it's advantageous to be able to tell them what versions of DocuPhase and ScanDox you are currently using. This information can be found as follows:

FIND THE DOCUPHASE VERSION INFORMATION

From the DocuPhase Main Header:

Go to **Administration►Security Manager►Security Manager** to display product information for DocuPhase.

Administration

🔒 SYSTEM

Security Manager

Security Manager

DocuPhase Version: 6.3.0.464
Database Version: 6.3.0
Licensed Concurrent Users: 100
Current Concurrent Users: 0

Please provide this information when submitting a ticket for Technical Support.

Accounting Supervisor	swright12	DocuPhase Workflow User	fe80::d8a0:fd2d:96 15		
System Administrator	sysadmin	DocuPhase Named User	fe80::d8a0:fd2d:96 15		
System Administrator	sysadmin	DocuPhase Workflow User	fe80::d8a0:fd2d:963:3cd1% 15	5/8/2018 11:51:56 AM	☐
Accounting Supervisor	swright12	iForms Named Filler	fe80::d8a0:fd2d:963:3cd1% 15	5/8/2018 11:48:01 AM	☐

Select **All** Users ☐

Log Out

Manage Locked Records

FIND THE SCANDOX VERSION INFORMATION

ScanDox

File   View   Tools   Help
About

ScanDox

Contact Information
DocuPhase Corporation
Phone: 727-441-8228
Email: Support@DocuPhase.com
Web Site: http://www.DocuPhase.com
Copyright © 2000-2019, DocuPhase Corporation

DOCUPHASE

Product Version:	6.3.0.464
File Version:	6.3.0.464

From the Help menu at the top of the ScanDox window: :

Select **About** to display product information for ScanDox.

Please provide this information when submitting a ticket for Technical Support.

Appendix B – Finding Application (Folder) Information

The folders that appear in the Application Information list may vary depending upon how ScanDox was configured for your organization.

What's in the Application Information Window

The folders in the list contain information used by ScanDox for processing files: including any files residing in the ScanDox Tray, as well as information regarding profiles, permissions, and Applications.

Application Information		
Config folder	C:\Users\Administrator\A...	Folder
Data folder	C:\Users\Administrator\A...	Folder
Files folder	C:\Users\Administrator\A...	Folder
Log folder	C:\ProgramData\DocuPh...	Folder
Uploads folder	C:\ProgramData\DocuPh...	Folder

Open ...   OK

This folder...	Contains...
Config	all of the (xml) files) used for configuration of settings and data needed for ScanDox.
Data	data required for various ScanDox settings and information for user permissions and available options (e.g., local profiles, workspace, etc.)
Files	all files held in the Tray, waiting for submission to DocuPhase.
Log	event files that can be used to diagnose any issues that may arise.
Uploads	any files that have recently been submitted to DocuPhase. Once a file is uploaded to this folder, it's picked up by the Uploads Service, along with its associated xml information (i.e., application and index data), and submitted to DocuPhase (review ScanDox Document Flow on page 2) **📄 NOTE** *Because the uploading of documents to DocuPhase is continuous, as well as the number/size of the documents submitted at once, the process of sending them to DocuPhase may happen instantaneously.* *If no documents appear in the Uploads folder, they have either not been properly submitted (e.g., user didn't actual click on 📷), or submitted documents have already been sent to the DocuPhase Repository.*

Appendix B – Finding Application (Folder) Information

Finding the Application Information Window
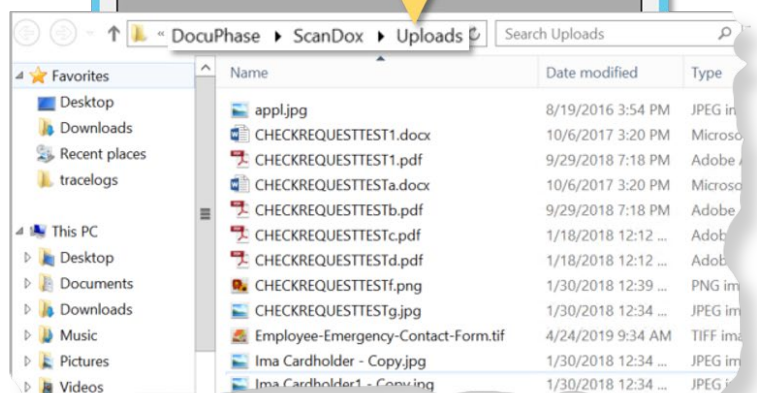
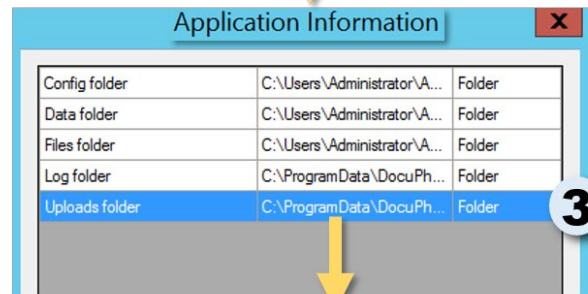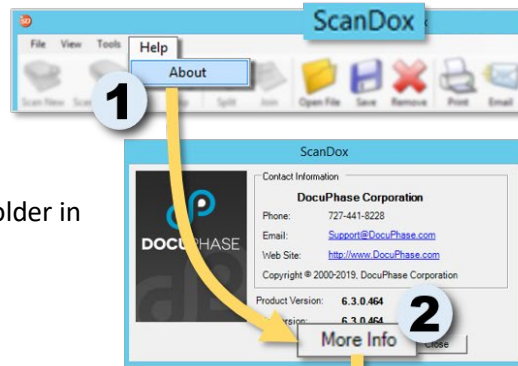*From the Help menu at the top of the ScanDox window:*

1) Select **About** to display product information dialog.

In the ScanDox information dialog:

2) Click [More Info] to display the Application Information window containing the ScanDox-related folders.

In the Application Information window:

3) Double-click any folder to display the associated folder in a browser window.

> ☐ **NOTE**
>
> *Remember, the uploading of documents to DocuPhase is continuous, as well as the number/size of the documents submitted at once, the process of sending them to DocuPhase may happen instantaneously.*
>
> *If no documents appear in the Uploads folder, they have either not been properly submitted (e.g., user didn't actual click on), or submitted documents have already*

Appendix C – Reviewing the Upload Services Log File

You can easily access the Log file for ScanDox Upload Services:

From the Help menu on main window of ScanDox:

1) Select **About** to display the product information dialog.
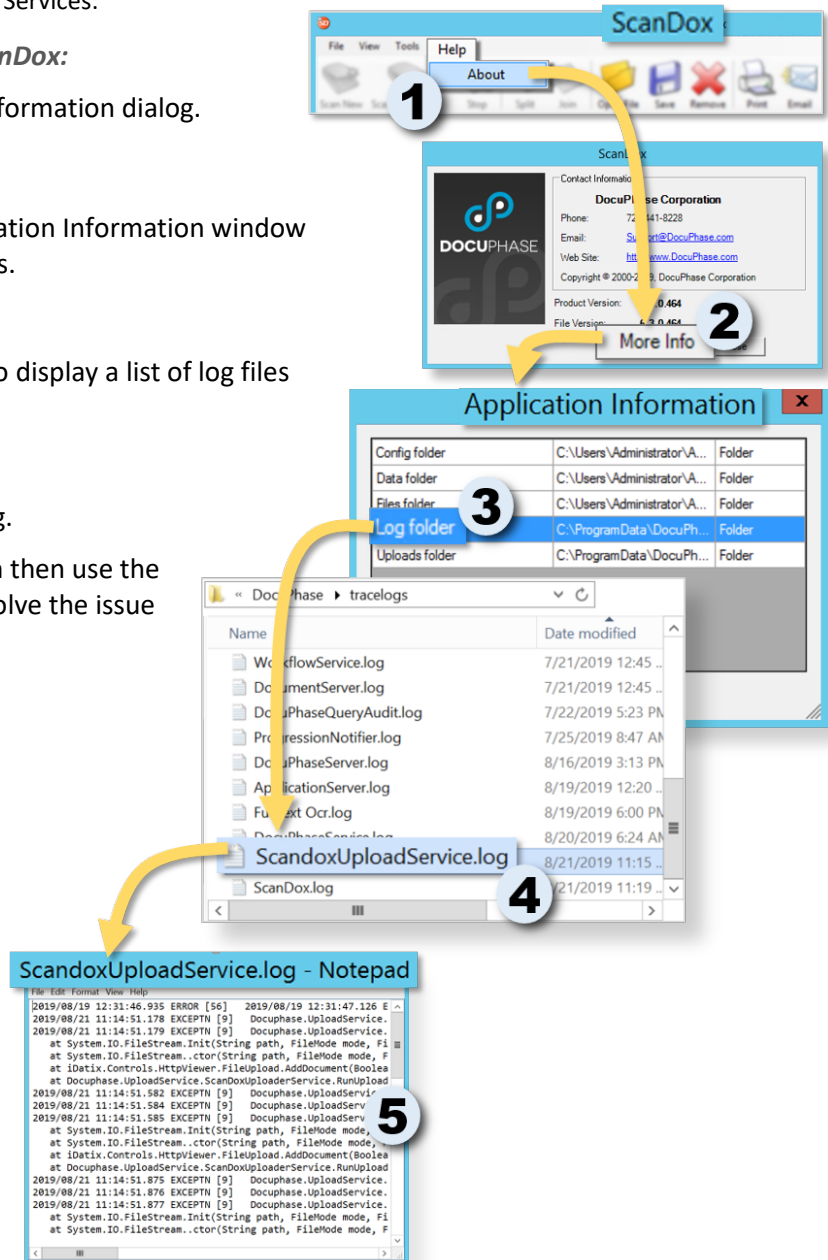
From the product information dialog:

2) Click [More Info] to display the Application Information window containing the ScanDox-related folders.

In the list of directories:

3) Find and open the Log Folder option to display a list of log files for your workstation.

In the list of log files:

4) Find and open the Upload Services Log.

5) Review the log for any errors. You can then use the information provided in the log to resolve the issue in question.

Appendix D – Finding Configuration Files (TPOCs Only)

> ⚠️ **WARNINGS!**
>
> *Only certified TPOCs should be accessing and/or editing configuration files of any kind.*
>
> *Always open configuration files with Notepad++ (or any XML editor); opening it with regular Notepad saves configuration file in .txt format (rather than its "config" format): resulting in broken configuration.*
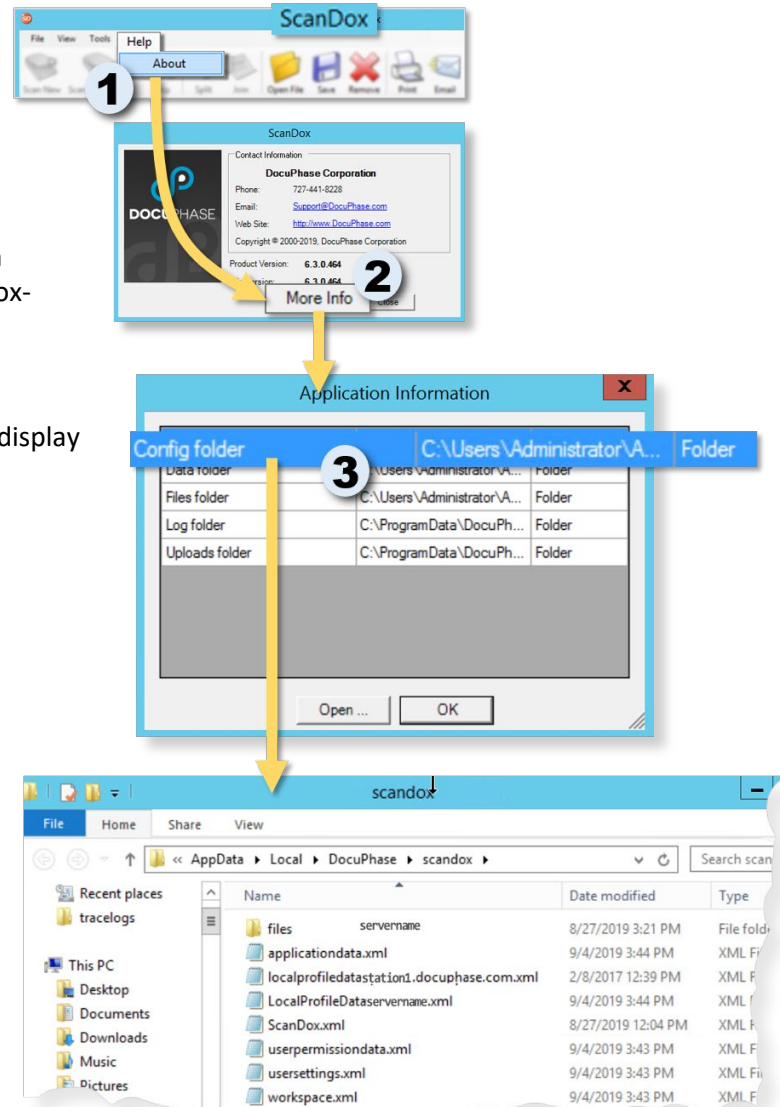
From the Help menu on main window of ScanDox:

1) Select **About** to display the System Information dialog.

From the System Information dialog:

2) Click More Info to display the Application Information window containing the ScanDox-related folders.

In the list of directories:

3) Find and open the Config Folder option to display a list of xml Configuration files.

Appendix E – Reviewing the Batches Table

You can easily access the Batches Table via the SQL Server Management Studio:

Navigating to the Batches Table

1) Open and connect to SQL Server to display the **Object Explorer**.
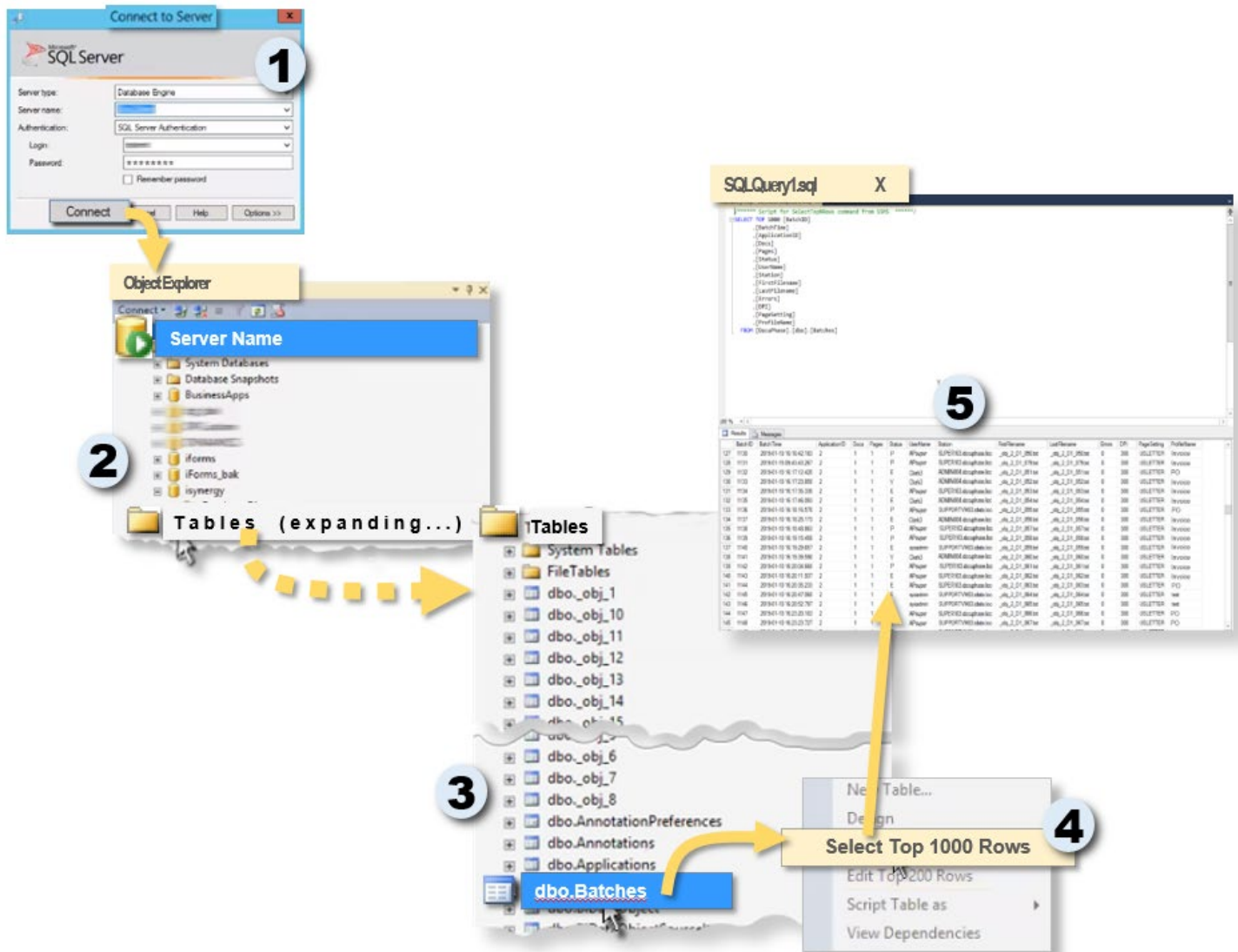
In the Object Explorer:

2) Go to **Server Name▶Tables** to find the **dbo.Batches** table

3) Right-click on dbo.Batches to display a list of options.

In the List of Options:

4) Click on **Select Top 1000 Rows** to display the Batches Table.

In the Batches Table:
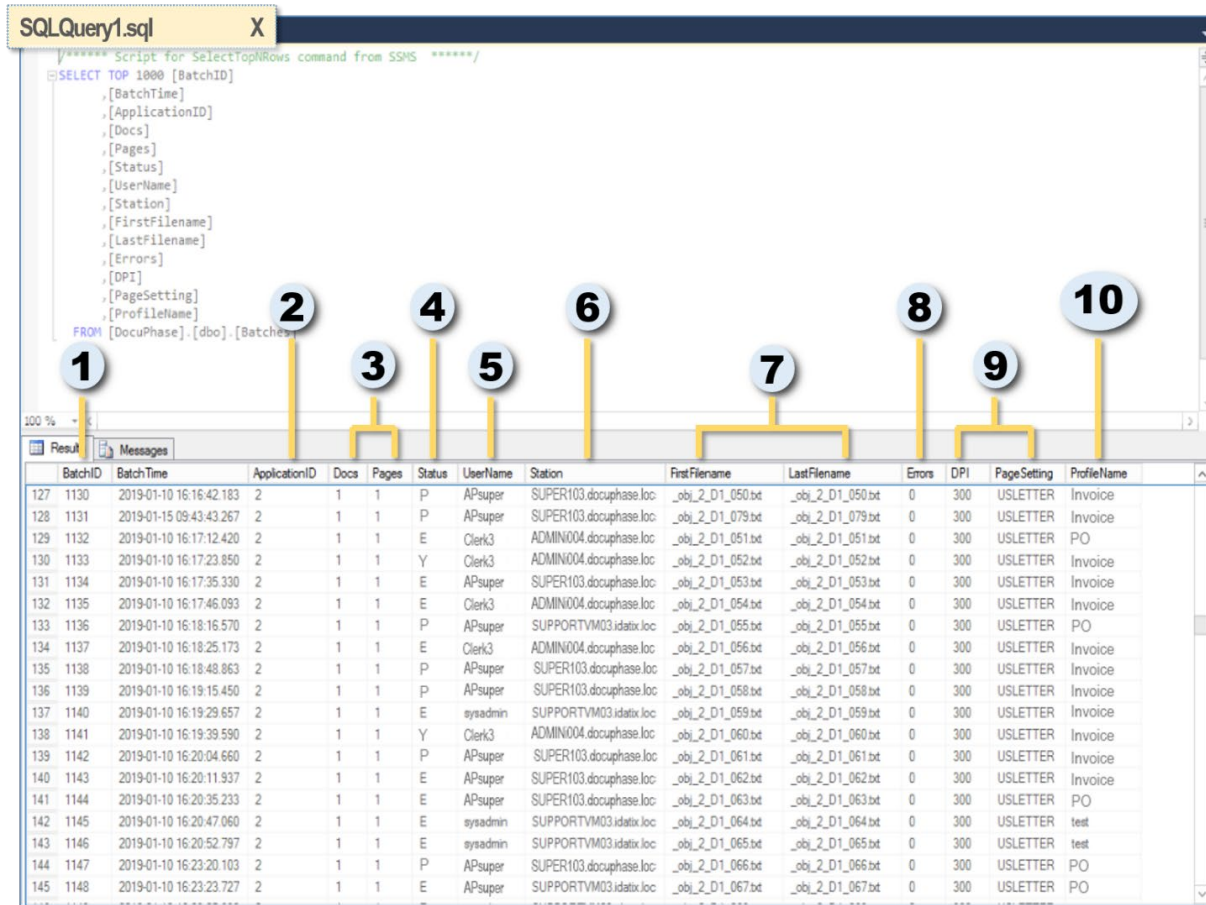
5) Review the details in the table to find/locate a missing document (see next page for more information).

Reviewing the Batches Table

Item #	Description
1	**Batch ID** – each ID relates directly to an Application
2	**Application ID** – the unique ID associated with the Application to which the Batch was submitted.
3	**Docs & Pages** – shows the total number of documents, as well as the total number of pages.
4	**Status** – provides the status under which each batch was submitted.
5	**User Name** – the name associated with the user who submitted the Batch.
6	**Station** – shows the workstation used to submit the Batch.
7	**First File Name** & **Last File Name** – shows the names of the first and last documents included in the Batch. If there was only one document in the Batch, these will be the same.
8	**Errors** – allows you to locate any Batches with Errors. If errors appear in this column, review the Log File to find the description of each error. You can then develop a resolution based on that description (see Appendix C on page 17 for more information about Log files).
9	**DPI & Page Setting** – provides the DPI and the size of page settings used when the related Batch was scanned/submitted.
10	**Profile** – the name of the Profile under which the Batch was submitted. The Profile determines the Application to which the Batch was assigned, as well as the Status given to the Batch.